



The 10-Minute Dream Client Snapshot Guidebook



**Get clear on who you serve and how
to reach them – fast.**

WELCOME

Running a business is exciting — but let's be honest, it can also feel overwhelming. You've got a million decisions to make, and every expert out there seems to be shouting a different answer.

Here's the truth: the businesses that grow the fastest aren't always the ones with the biggest budgets or fanciest logos. They're the ones who know exactly who they're serving.

Clarity is power. When you know your dream client, everything gets easier:



You stop second-guessing what to post on social media.



You stop wasting time chasing people who were never going to buy.



You start attracting clients who feel like a perfect fit.

That's what this Sidekick is for. In just 10 minutes, it will help you cut through the noise and hand you a Dream Client Snapshot you can actually use.



Psychology Tip

Our brains filter for relevance. If your words don't mirror a reader's lived experience, they scroll. Specificity = relevance.

WHAT A DREAM CLIENT AVATAR REALLY IS

Most people think a “client avatar” just means age, job title, and maybe income. That’s surface-level. A real dream client profile digs deeper.

There are three layers to pay attention to:



Stage & Context

Where are they right now? Are they starting out, plateauing, or scaling? What’s happening in their business or life that shapes their decisions?



Values & Drivers

What matters most to them? Freedom, security, recognition, balance? Their values are what make them buy one thing over another.



Struggles & Aspirations

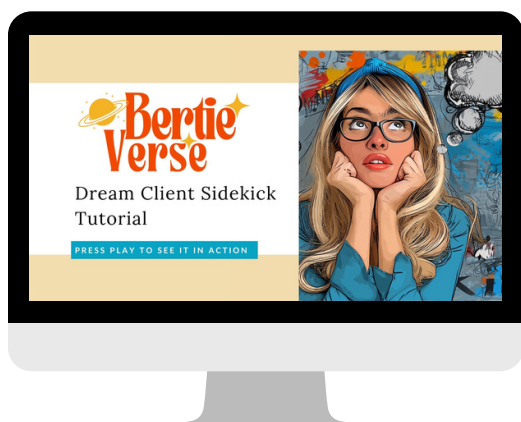
What’s frustrating them right now? What do they dream of instead? These are the pain points and desires that make your offer feel like the solution they’ve been waiting for.



Psychology Tip

When you know these three things, you don’t just describe your dream client — you understand them. And when you understand them, your words, offers, and marketing finally click.

HOW TO USE THE DREAM CLIENT SIDEKICK



Watch the Video
Tutorial

[HERE](#)

Step 1: Sign Up or Log In

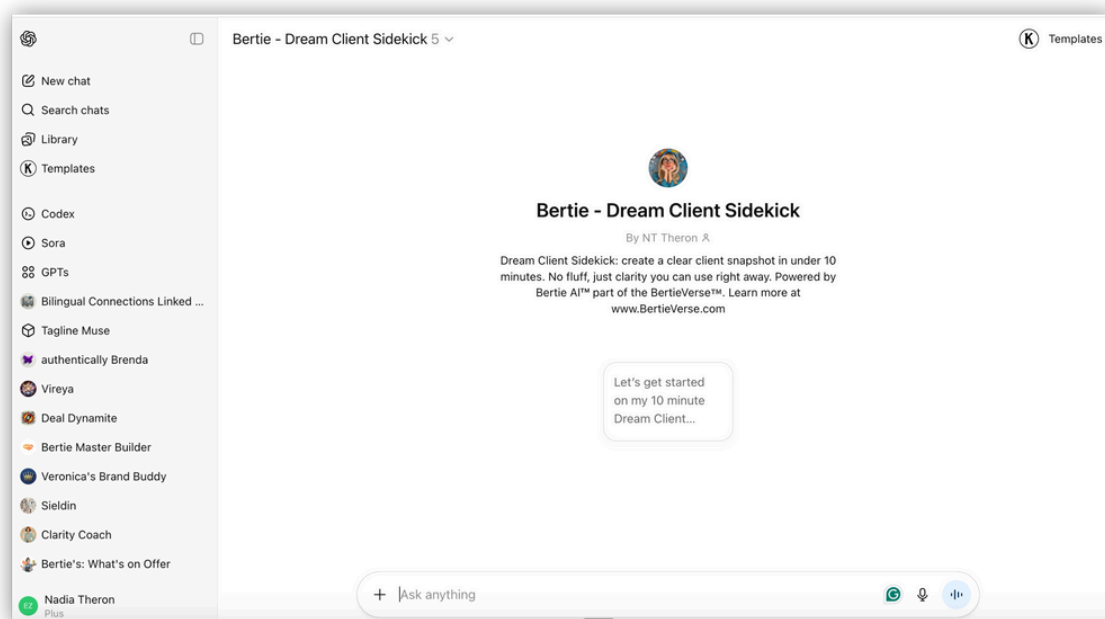
You can sign up for a free ChatGPT account here:

[ChatGPT LINK](#)

Step 2: Import Your Sidekick

Once you've logged into your ChatGPT account click the link below to import your sidekick, You only need to do this once.

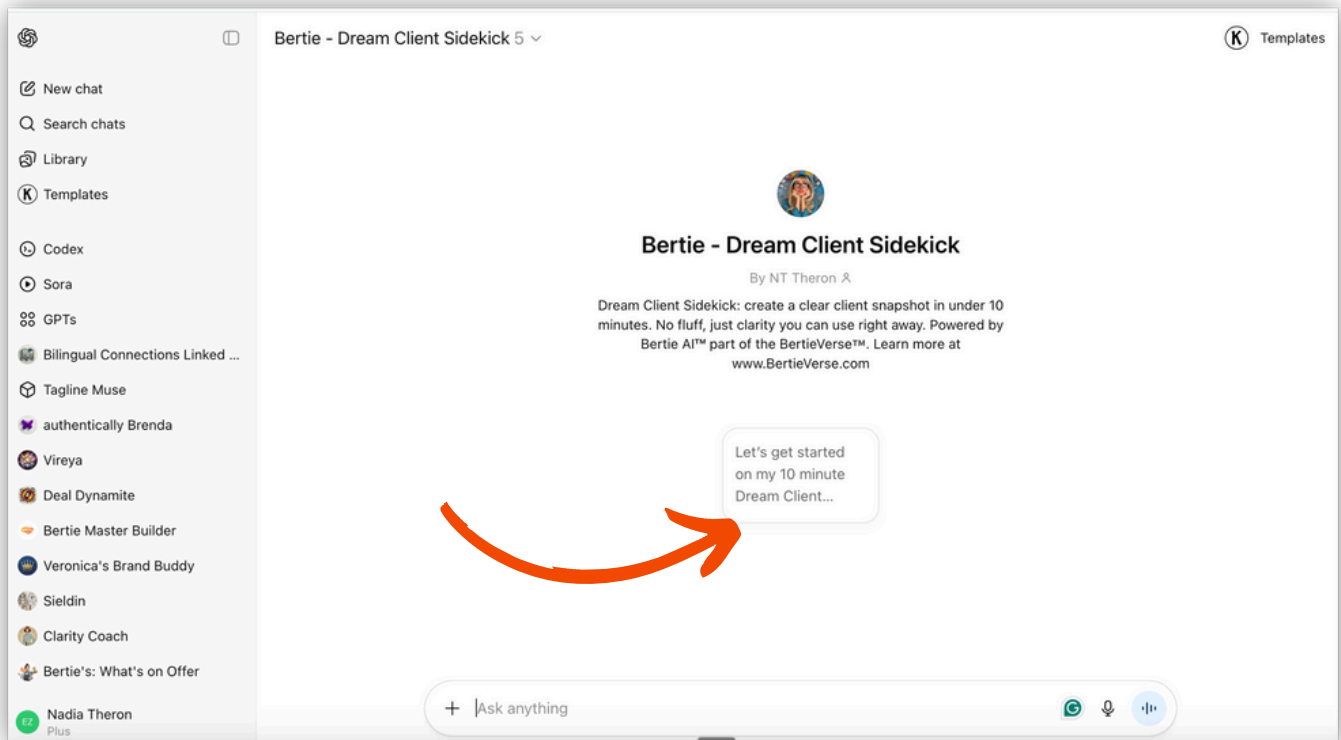
[Import Sidekick LINK](#)



HOW TO USE THE DREAM CLIENT SIDEKICK

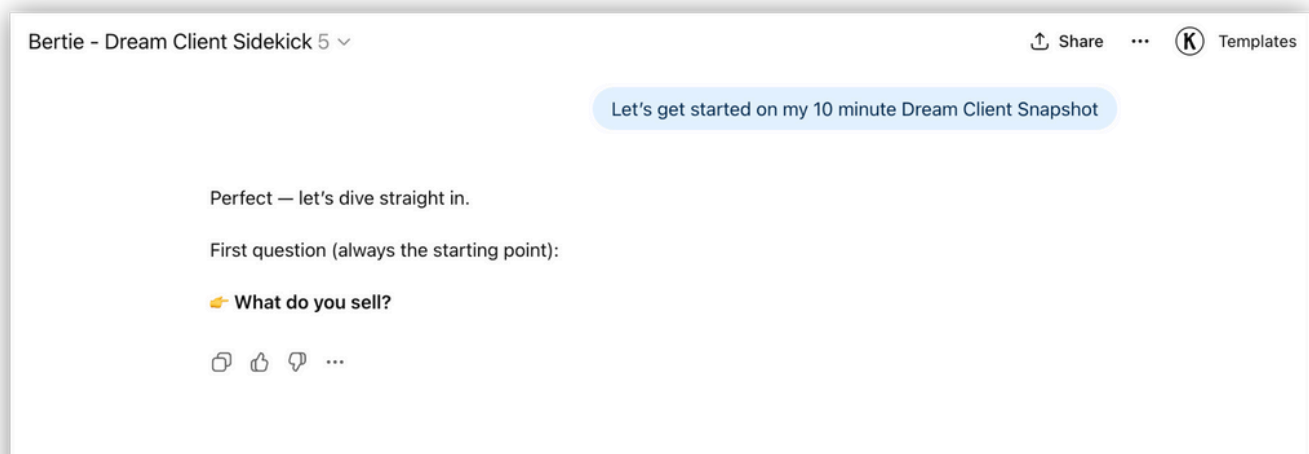
Step 3: Get Started

Once imported, you'll see a start button: "Let's Get Started on My Dream Client Snapshot."



Step 4: Answer a Few Quick Questions

The Sidekick will ask you about your business and who you think your dream client is. Don't overthink it



EXAMPLE OF A DREAM CLIENT SNAPSHOT REPORT

Here we go — your **10-Minute Dream Client Snapshot** 📌

Dream Client Snapshot

Niche: Alternative health insurance for US entrepreneurs

Overview

Your dream client is a female entrepreneur in her 30s–40s, with children, and running her business while holding the family together. She's ambitious, stretched thin, and used to solving problems herself — but health insurance feels like one battle she can't win.

Why it matters: Messaging must acknowledge her juggling act and position you as the *simplifier* — someone who removes mental load, not adds to it.

Actionable: Show you understand her world (kids + business + chaos) and offer an easy, guided path to better insurance.

Stage & Context

- Business owner or self-employed, not cushioned by corporate benefits.
- Feels responsible for her family's health and finances.
- Already paying for insurance that feels overpriced and under-delivers.

Why it matters: She sees health insurance as a necessary evil, not a choice.

Actionable: Position your product as the “smart alternative” that finally gives her options.

Values & Drivers

- Security for her children and family.
- Freedom to choose what's best for her health.

EXAMPLE OF A DREAM CLIENT SNAPSHOT REPORT

- Smart financial decisions that support her entrepreneurial lifestyle.

Why it matters: She'll pay for peace of mind if it feels like control, not confusion.

Actionable: Frame your offer as family-first, freedom-giving, and cost-smart.

Fears & Struggles

- Fear of making the wrong choice and leaving her family exposed.
- Overwhelm from jargon and bureaucracy.
- Avoids change because it feels exhausting.

Why it matters: The real enemy isn't the competition — it's *inaction*.

Actionable: Simplify the process, highlight ease of transition, and tackle the "too much hassle" objection head-on.

Aspirations & Desired Outcomes

- Wants to feel in control of her health care choices.
- Dreams of saving money without sacrificing quality.
- Wants reassurance she's doing right by her kids.

Why it matters: Insurance is emotional, not just financial.

Actionable: Sell the outcome — peace of mind, flexibility, and savings — not just the policy.

Buying Behaviors

- Research-heavy, likes to compare and verify.
- Reads reviews, looks for credible proof.
- Likely to follow recommendations from peers or trusted communities.

EXAMPLE OF A DREAM CLIENT SNAPSHOT REPORT

Actionable: Create educational, transparent content. Provide side-by-side comparisons and client success stories.

Buying Triggers

- Sharp rise in premiums.
- Denied claim or unexpected cost.
- Life changes: new child, divorce, moving, business growth.

Actionable: Tailor marketing around “moments of financial pinch” and family transitions.

Decision-Making Style

- Analytical, detail-oriented.
- Wants clear explanations and straight talk, not sales spin.
- Relies on trust and credibility to feel safe.

Actionable: Use plain language. Offer guides, calculators, and decision-support tools.

Marketing Insights (Do's)

- **Do** show her how much she can save — in dollars and stress.
 - **Do** explain things simply and visually.
 - **Do** use testimonials from other women like her.
 - **Do** highlight easy switching (done-for-you).
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EXAMPLE OF A DREAM CLIENT SNAPSHOT REPORT

Red Flags (Don'ts)

- **Don't** use jargon or industry speak.
 - **Don't** push urgency with fear tactics.
 - **Don't** make it sound like a gamble.
 - **Don't** treat her like just another lead — she wants to be understood.
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Clarity Lines

- I help **female entrepreneurs in their 30s–40s** find **affordable, family-first health insurance** without the **confusion or overwhelm**.
 - I help **busy moms who run businesses** get **better coverage for less** without the **hassle of navigating the system alone**.
 - I help **self-employed women with families** feel **confident in their health insurance choices** without **sacrificing time or money**.
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“How to Use This” Checklist

- **Bio:** “Helping entrepreneurial moms save money and stress with smarter health insurance.”
 - **Hero line (website):** “Health insurance that finally makes sense for busy entrepreneurs.”
 - **CTA:** “Find out in 10 minutes if you're overpaying.”
 - **Content angles:** Cost savings breakdowns, family-first security, “switching is simpler than you think.”
 - **Proof asset:** Case study of a mom who saved \$\$\$ and gained peace of mind.
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PROMPT PLAYGROUND

Once you've got your Snapshot, you can play around a little. Here are some micro-prompts you can drop into your Sidekick to spark fresh ideas:

Social Media Spark

What kind of social media post would connect with this client avatar?

Subject Line Sizzle

Give me 5 email subject lines that would grab their attention.

Hidden Objections

What would stop this client from saying yes to my offer?

Testimonial Seed

Write one testimonial-style sentence this client wishes they could say about me.

Mistake to Avoid

What's a common mistake entrepreneurs make when talking to this type of client?

Content Compass

Suggest 3 content topics this client would love me to create.

PROMPT PLAYGROUND

Elevator Pitch Check

Rewrite my offer in one sentence that would make this client lean in and say, 'Tell me more.'

Trust Builder

What kind of proof would make this client feel confident in buying from me?

Motivation Booster

What daily frustration pushes this client to look for solutions like mine?

Pep Talk Prompt

Write me a quick pep talk before pitching to this type of client.

For even more prompts — and Sidekicks designed to help with offers, content, sales, and beyond — explore the Bertie Membership and the full Bertie Sidekick library inside the BertieVerse.



Psychology Tip

People don't buy the "best" product — they buy the one that gets them. This Sidekick is your cheat code to peek under the hood of your dream client and test ideas before you ever go live.

WELCOME
TO THE



You've just had a taste of what Bertie can do. But this is only the beginning.

The BertieVerse is where entrepreneurs, coaches, and business owners cut through the noise and get the clarity, tools, and support they need to actually move forward.

Inside, you'll find:



Smart AI tools & Sidekicks that do the heavy lifting for you.



Proven expert-led frameworks that worked before AI, now amplified by it.



Live masterclasses & events where you learn, apply, and connect.

No overwhelm. No fluff. Just the right resource at the right time — so you can stop overthinking and start overachieving.

Your Next Step

Click below to explore the BertieVerse and see how it can power your business.

[Explore BertieVerse](https://www.bertieverse.com)